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ABSTRACT

As part of the Comprehensive School Reform Demonstration (CSRD) program, schools participated in the Formative Evaluation Process for School Improvement (FEPSI), a package of services mainly provided during two visits each school year. This document reports on the evaluation of training for Georgia educators involved in FEPSI as site researchers. Twenty-two of the original 30 participants returned a completed evaluation form after the training. Participants rated all items on the survey as highly related (mean of 4.1 or above on a 5-point scale) to specific and general training objectives, and believed the training was conducted by competent presenters in a professional manner. Participants appeared to learn most about the role of formative evaluation in the CSRD program. In general, participants seemed pleased with the training materials and found the benchmarking materials for the FEPSI process to be helpful. They would have preferred more training in benchmarking and would have liked more time to practice the benchmarking process. Some recommendations are made for program improvement. Appendixes contain the school observation measure site researchers would use, a sample benchmark document, the evaluation form, and a checklist for applying the standards from the "Program Evaluation Standards," 1994. (SLD)

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Site Researcher Training in the Formative Evaluation Process for School Improvement (FEPSI): Georgia, October 1999

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A Report on the Formative Evaluation Process for School Improvement: A joint initiative between AEL, Inc. and the Center for Research in Educational Policy (CREP) at The University of Memphis

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February 2000

A Report on the Formative Evaluation Process for School Improvement:
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the Center for Research in Educational Policy (CREP)
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AEL's mission is to link the knowledge from research with the wisdom from practice to improve teaching and learning. AEL serves as the Regional Educational Laboratory for Kentucky, Tennessee, Virginia, and West Virginia. For these same four states, it operates both a Regional Technology in Education Consortium and the Eisenhower Regional Consortium for Mathematics and Science Education. In addition, it serves as the Region IV Comprehensive Center and operates the ERIC Clearinghouse on Rural Education and Small Schools.

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INTRODUCTION

Federal CSRD Legislation

School improvement is increasingly viewed as an ongoing and comprehensive process. Recent legislation has encouraged the adoption of such a view: in 1994, Congress altered regulations to allow those schools receiving Title I funds with the percentage of students receiving free and reduced lunch at 50% and above to use such funds for whole school improvement (American Institutes for Research, 1999). Later, as part of the FY 98 Labor-HHS-Education Appropriations Act (PL 105-78), and again in 1999, Congress designated $150 million to promote comprehensive school reform. Much of these Comprehensive School Reform Demonstration (CSRD) funds flowed through states through a competitive grant process to schools and districts interested in implementing schoolwide, comprehensive reform. Of these monies, $120 million came from Elementary and Secondary Education Act (ESEA) Title I funds allocated by formula to states to allow current Title I schools to adopt comprehensive school reform models. The Fund for the Improvement of Education (FIE) allocated $25 million to flow to states by school-age population to allow non-Title I schools to implement reform programs. In addition, $4 million were allocated to Regional Educational Laboratories to assist states, districts, and schools in the implementation of the CSRD program. The remaining $1 million was used by the U.S. Department of Education to inform states and local schools about existing comprehensive reform models.

According to the New American Schools (NAS) organization, which has developed several of the schoolwide reform models adopted by CSRD-funded schools, "the success or failure of the CSRD Program has enormous implications for public education in the country's poorest neighborhoods." Title I of the ESEA of 1965, which provides federal funding for disadvantaged students, is due for congressional reauthorization this year. "To encourage research-based and replicable best practices," Congress may reauthorize Title I based upon lessons learned from CSRD (NAS).

AEL CSRD Program

AEL, Inc. began assisting Kentucky, Tennessee, Virginia, and West Virginia, the four states in its region, in early 1998 as part of the effort to support state departments of education in their implementation of CSRD. Assistance to state departments has included consultation and technical assistance concerning the development of procedures and criteria to select competitively the schools that would receive assistance under this program. Also, AEL has collaborated with state departments in developing procedures for guiding interested districts and schools through the process of assessing their needs, selecting among research-based reform models, or choosing to develop their own research-based comprehensive program. Also in collaboration with state departments, AEL has developed and provided workshops and technical assistance to schools and districts preparing their applications for grants under this program. Such workshops have included information about candidate reform programs, assistance with compiling aggregate components to create comprehensive programs for those not opting to purchase a model, and guidance regarding how to evaluate the effectiveness of programs implemented.

Another significant component of AEL's CSRD program is an Academy for External Facilitators. *External facilitators* are individuals assigned by state departments of education to assist schools implementing CSRD-funded reform initiatives. AEL's Academy offers training and support as external facilitators execute five challenging roles in school reform: using the knowledge base on effective practices leading to improved student performance; modeling collaboration and joint problem solving; collecting, organizing, and analyzing school data to make decisions; brokering and recommending resources; and acting as agents of change in contexts in which facilitators possess no authority to direct change.

Other AEL CSRD services have included a research symposium on CSRD and schoolwide reform and several independent and collaborative research efforts.

Formative Evaluation Process for School Improvement (FEPSI)

Still another important facet of AEL's CSRD program work has been to assist states and schools evaluate the effectiveness of programs implemented with CSRD funds. Participating CSRD schools are required to evaluate their progress toward nine CSRD implementation criteria (evaluation itself being one of the nine criteria). These nine criteria are

(1) use of research-based methods/models

(2) comprehensive design, in which the model(s) chosen are aligned to curriculum, instruction, and organization in the school

(3) professional development

(4) development of measurable goals and benchmarks

(5) establishment of support within the school

(6) parent and community involvement

(7) consultation of external support and assistance

(8) use of evaluation strategies

(9) coordination of resources (Education for the Disadvantaged, 1998; see also AEL & CREP, 1999)

In May 1998, a partnership began between AEL, Inc. and the Center for Research in Educational Policy (CREP) at The University of Memphis to aid schools in their endeavor at self-evaluation. CREP and AEL designed a process called the Formative Evaluation Process for School Improvement (FEPSI) that incorporates several instruments and procedures developed by CREP. FEPSI is a package of services provided mainly during two visits per school year, one each in the fall and spring, by a trained individual called the *site researcher*. The fall and spring visits each consist of a different slate of data collection activities.

During the fall visit, the site researcher conducts (1) a principal interview, (2) a *School Observation Measure*™ (SOM) comprised of several classroom visits, and (3) a benchmark-writing session with a committee of faculty. The principal interview is a 1-hour forum for learning a principal's perceptions of CSRD implementation in his or her school. The SOM, an instrument developed by CREP, is a summary of ten 15-minute classroom observations typically conducted in

the course of a few hours (see both parts in Appendix A). In brief, the items on which classrooms are observed are best practices in instruction and instructional orientation that characterize the intended nature and organization of CSRD schools. Also adapted and designed by CREP, benchmarking is a process by which schools chart the course of CSRD implementation relative to the nine criteria; the resultant benchmark document is intended to be a signatory piece that a school owns and refers to over the course of three years of implementation and thereafter (see Appendix B for a page of a sample benchmark document).

In the intervening period between the two visits, schools receive technical assistance and suggestions for revision on the first draft of their benchmark document by phone and mail from an AEL/CREP staff member. Also during this period, eight additional SOMs are conducted by a school's external facilitator, which are added to the data collected by the site researcher.

During the spring visit, the site researcher conducts (1) another SOM, (2) a focus group with a random selection of teachers, (3) a benchmark review with the committee that wrote the benchmark document in the fall, (4) a whole faculty meeting, and (5) an *interview design* process.[1] Similar to the principal interview, the focus group is a forum for learning teachers' views of CSRD implementation. The benchmark review involves marking the school's progress along a continuum expressed within the benchmark document. The purpose of the faculty meeting is to administer two questionnaires, the *School Climate Inventory*™ (SCI) and the *Comprehensive School Reform Teacher Questionnaire*™ (CSRTQ), both developed by the Center for Research in Educational Policy (AEL & CREP, 1999). The SCI assesses school climate along seven dimensions, consisting of 49 statements set to a 5-point Likert-type scale. The CSRTQ assesses a school's movement toward school reform along four dimensions—professional development, resources, pedagogical change, and outcomes—and also its specific progress toward school benchmark goals. Interview design is a musical chairs way of collecting data from many individuals in a small amount of time. All participants engage in asking and answering questions and analyzing responses. This procedure was

[1]Interview design is a technique used at the Wharton School, Management and Behavioral Science Center, introduced to AEL by Oralie McAfee (AEL & CREP, 1999).

incorporated into the FEPSI package as a way of gathering data from individuals from role groups other than the faculty; those to be included in the interview design process are community members, parents, and students.

If it is possible to coordinate, it is desirable that a school's external facilitator accompany the site researcher on both the fall and spring visits to a school. Following each visit, the site researcher is responsible for shipping data in appropriate formats to CREP. Based on the data collected by the site researcher and the external facilitator, the staff of the AEL/CREP partnership prepare and mail a report to each participating school at the end of the school year. Schools are assured of confidentiality and encouraged to use the report, along with their benchmarks, to adjust their activities to enhance CSRD implementation.

Originally, FEPSI was introduced to the four states in AEL's region: Kentucky, Tennessee, Virginia, and West Virginia. Kentucky, Tennessee, and West Virginia required their CSRD schools to use FEPSI, while Virginia encouraged its CSRD schools to use it. In total, 101 schools[2] in these four states adopted FEPSI, purchased at a reasonable cost through the AEL/CREP joint initiative. Eighteen educators from these four states were trained as site researchers in September 1999, to facilitate the FEPSI process for schools.

Georgia FEPSI Training

After learning of FEPSI, CSRD staff from the Georgia Department of Education contacted AEL/CREP staff to express an interest in receiving FEPSI training and services for educators and CSRD schools in Georgia. The introduction of FEPSI to Georgia educators also served the purpose of being an initial step in marketing FEPSI beyond the four states in AEL's region and CREP's original area of practice (Tennessee).

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[2] Ninety-six of the 101 schools were CSRD schools and participated in FEPSI to fulfill the evaluation component of the nine criteria. Five were not CSRD schools; however, they were implementing a research-based model and so chose to use FEPSI to chart their progress in model implementation.

The training was held October 11-13, 1999, at the Holiday Inn Conference Center in Macon, Georgia. Its major components were an overview of CSRD and FEPSI, instruction in how to conduct a SOM (which included practice SOMs in area schools), and instruction in benchmarking. A supplementary handbook compiled in a three-ring binder was given to each participant at the commencement of the training. It included overviews of CSRD and FEPSI, the scope of work for site researchers, sections explaining the various FEPSI activities, and some of the protocols to be used. An additional resource was provided during the instruction on SOMs, a booklet of definitions for the practices to be observed during a SOM (CREP, 1999).

Purpose and Objectives of Evaluation

In an ongoing effort to improve its services and to satisfy its obligations to the U.S. Department of Education's Office of Educational Research and Improvement, AEL evaluates all of its activities associated with regional educational laboratory work. Accordingly, evaluation of AEL's CSRD work is undertaken to assess these services and their potential outcomes and impact. This report is intended to inform staff as they continue to make decisions regarding the content and structure of training sessions in FEPSI.

The objectives of this evaluation report are to

- assess the quality of presentation of the FEPSI training in Georgia
- assess the knowledge and skills gained by training participants
- assess aspects of the training for future FEPSI trainings outside AEL's region and CREP's usual area of practice

Audience

The primary audiences for this report are CSRD staff at AEL and staff of the AEL/CREP partnership. Secondary audiences include other AEL staff and management, and researchers interested in formative evaluation of comprehensive school reform.

METHOD

A survey evaluation was conducted of the FEPSI training in Georgia.

Participants

Thirty educators were listed as participants to be trained as site researchers to facilitate the FEPSI process in 75 Georgia schools.[3] At any given time during the training, between 25 and 30 participants attended. Twenty-two participants returned a completed evaluation form.

Instrument

An evaluation survey form comprised of forced-choice and open-ended response items was designed by CSRD staff and evaluators (see Appendix C). It presents 37 questions divided into five sections. Section A consists of general forced-choice questions about the quality of training presentation, set to a 5-point Likert-type scale. Section B consists of forced-choice questions about the training's value in teaching specific knowledge and skills related to FEPSI; each of the items was set to two 5-point Likert-type scales, one measuring *prior knowledge* and one measuring *knowledge gain*. The remaining three sections consist of open-ended response questions about the utility of the training and materials relative to three distinct aspects of the training—overview of CSRD and FEPSI, how to conduct a SOM, and how to do and facilitate benchmarking.

A Cronbach alpha, $r = .94$, was generated for Section A of the instrument comprised of 14 items (based on 21 respondents). Thus, this part of the instrument, which gauged the quality of the training presentation, possessed high internal reliability. An alpha coefficient was not computed for the second section of questions, related to the attainment of knowledge and skills specific to FEPSI activities, because these items were independent of each other.

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[3]The 75 CSRD schools in Georgia were required to use FEPSI services. Site researchers were each assigned to serve one to several schools.

Procedure

The evaluation form was distributed to participants at the conclusion of the 3-day training. Evaluation staff were not present at the training; therefore, the form was distributed by AEL CSRD staff who had attended the training. Completed forms were collected by one of Georgia's CSRD staff (and also a training participant) and mailed to AEL CSRD staff.

Data Analyses

Data were entered into SPSS 8.0 for Windows. Descriptive statistics on the forced-choice items of Sections A and B were generated. Open-ended response items in the last three sections were summarized. Analyses were conducted by members of the CSRD evaluation team.

FINDINGS

Twenty-two of the original 30 participants completed the evaluation form for this training.

Section A

For the first 14 questions related to the quality of training presentation, respondents answered on a 5-point Likert-type scale, anchor point 1 meaning *not at all* true and anchor point 5 meaning *very much* true.

Responses to all 14 items had a mean of 4.1 or higher (see Table 1). The two items that garnered the highest ratings (as well as the least amounts of variation) were items 6 and 7: *Was conducted in a professional manner* (4.7, *SD* .48) and *Was conducted by competent presenter(s)* (4.8, *SD* .43). The lowest rated item was *Had activities that were well sequenced* (4.1, *SD* .71). Two other items with a comparatively lower rating also had the highest amounts of variation: *Stimulated me to want to use the concepts . . . presented* (4.2, *SD* .83) and *Increased communication and collegiality with others* (4.2, *SD* .80).

Table 1
Descriptive Statistics for Section A of the Georgia FEPSI Training Evaluation Form

Item	N	Mean	*SD*
1. Had clear outcomes	22	4.5	.67
2. Included clear directions for activities	22	4.5	.60
3. Facilitated development of new skills	22	4.3	.77
4. Was conducted in an appealing manner	22	4.3	.72
5. Was conducted in a professional manner	22	4.7	.48
6. Was conducted by competent presenter(s)	22	4.8	.43
7. Had activities that were well sequenced	22	4.1	.71
8. Had activities that reinforced content	22	4.4	.67
9. Included appropriate examples	22	4.5	.60
10. Was relevant to my needs	21	4.6	.51
11. Had meaningful involvement of participants	22	4.4	.66
12. Stimulated me to want to use the concepts, skills, and/or materials presented	22	4.2	.83
13. Increased communication and collegiality with others	22	4.2	.80
14. Increased my understanding of formative evaluation	22	4.6	.60

Section B

For the next 11 questions about the training's value in transmitting specific knowledge and skills relevant to FEPSI, respondents rated both their *prior knowledge* and *knowledge gain*. Respondents rated their knowledge gain most highly regarding *Understanding the role of formative evaluation in the CSRD program* (4.6, *SD* .75). They rated their knowledge gain the least regarding *Technology skills* (1.5, *SD* .87). See Table 2 for details.

The difference scores between prior knowledge and knowledge gain showed that on most items, respondents rated their knowledge gain less highly than their prior knowledge (see Table 2). This may indicate that participants already possessed a good deal of knowledge regarding these items. Two items that depart from this pattern are *Understanding the role of formative evaluation in the CSRD program* (2.1, *SD* 1.27 for prior knowledge and 4.6, *SD* .75 for knowledge gain: difference score between means being 2.5) and *Knowledge about Comprehensive School Reform models* (2.8, *SD* .92 for prior knowledge and 2.8, *SD* 1.23 for knowledge gain: difference score between means being 0). Note that the former item was also the most highly rated item for knowledge gain.

Table 2
Descriptive Statistics for Section B of the Georgia FEPSI Training Evaluation Form

Item	Prior knowledge			Knowledge gain			Diff. Score
	N	Mean	*SD*	N	Mean	*SD*	
15. Understanding the role of formative evaluation in the CSRD program	22	2.1	1.27	20	4.6	.75	2.5
16. Knowledge of schools and classrooms	22	4.6	.60	21	2.9	1.26	-1.7
17. Learning data collection techniques	22	4.1	.84	22	3.8	1.18	-0.3
18. Oral and written communication skills	22	4.5	.60	22	2.8	1.33	-1.7
19. Facilitation skills	22	4.6	.67	21	3.0	1.24	-1.6
20. Skills in interpreting and analyzing qualitative and quantitative data	22	3.6	.79	22	3.4	.90	-0.2
21. Knowledge about and understanding of Comprehensive School Reform . . .	22	3.1	1.23	22	3.4	1.09	0.3
22. Knowledge about Comprehensive School Reform models	22	2.8	.92	22	2.8	1.23	0.0
23. Familiarity with common strategies associated with school reform . . .	22	4.1	.84	22	3.0	1.20	-1.1
24. Classroom observation skills . . .	22	4.3	.77	22	3.4	1.18	-0.9
25. Technology skills . . .	20	3.9	.97	21	1.5	.87	-2.4

Section C

The third section of the instrument posed these four questions related to the component of the training, *Overviews on formative evaluation and Comprehensive School Reform*: (1) the most effective part of the presentation, (2) the quality of alignment between materials and presentation, (3) suggestions for improving this part of the presentation, and (4) efficacy of this training segment in preparing the participant for implementing FEPSI.

Eighteen of 22 respondents answered the first question, *What was the most effective part of the Overview presentations?*, 3 giving more than one response. Six respondents said the presentation or presenter, referring to her or his knowledge, skills, expertise, or wit (some identified a presenter who did not present during this segment). Four additional respondents referred to a specific presentation technique that they appreciated: the use of analogies, the holistic picture, and the promise that overheads would be reviewed later. Four stated that the general CSRD or formative evaluation information or imparting of skills was the most effective aspect, 1 specifically saying the establishment of expectations for practice. Five respondents listed another component of the training instead of saying what was most effective about the overviews component: 4 referred to the SOM presentation and 2 referred to the benchmarking presentation. One respondent answered that she or he did not know.

Eighteen of 22 respondents answered the second question, *How well did the materials in your notebook align with the Overview presentations?* Fourteen respondents answered affirmatively with a qualifying term such as *excellent*, *great*, *very well*, or *good*, or just a statement; 1 respondent, however, added that a lack of sequence existed and 1 added that the page numbering could have been better. Two respondents also answered affirmatively, but less strongly, indicating that they thought alignment was fair; 1 of these respondents also commented about a lack of sequence. Two final respondents indicated dissatisfaction, stating problems in alignment, " 'hopping' around," and lack of matching to sequence of overheads.

Eighteen of 22 respondents answered the third question, *What suggestions would you have for improving the Overview presentations?* Seven said none. Three suggested using an electronic medium for presentation, such as PowerPoint. Two suggested clarifying the time line of expectations. Finally, 6 respondents each made one of the following suggestions: make overheads available to trainees, rewrite the overheads so that each captures more concepts, number the pages of the manual consecutively, allow more time, allow more time for benchmarking, and revise presenter style so that it is not condescending. At least 2 of this latter group of responses seem to have been referring to another presentation.

Nineteen of 22 respondents answered the fourth question, *How well did the Overview presentations prepare you for implementing the Formative Evaluation Process for School Improvement?* Thirteen answered affirmatively with a qualifying term such as *very well* or *good* or with a statement that they felt prepared. Another 3 respondents also answered affirmatively, but less strongly, with a qualifying term such as *fair* or *average*. Still another respondent said *OK*. One respondent stated a need for the overheads. A final respondent said that she or he did not know.

Section D

The fourth section of the instrument posed these four questions related to the component of the training on *Benchmarking*: (1) the most effective part of the presentation, (2) the quality of alignment between materials and presentation, (3) suggestions for improving this part of the presentation, and (4) efficacy of this training segment in preparing the participant for implementing FEPSI.

Eighteen of 22 respondents answered the first question, *What was the most effective part of the Benchmarking presentations?*, 3 giving more than one response. Eight respondents listed the preview of benchmarking and/or the examples presented during the preview. Four said the opportunity to practice benchmarking, 1 adding that they needed more practice. Three said the directions or hints given about benchmarking. Two respondents said that the clarification of the type of benchmarks under study helped them. Two respondents listed the presenter, and 1 respondent listed the handbook. One response could not be coded.

Nineteen of 22 respondents answered the second question, *How well did the materials in your notebook align with the Benchmarking presentations?* Fifteen answered affirmatively with a qualifying term such as *very well* or *good* or with a statement. Various comments by these respondents were that materials were easy to follow and helpful and that they appreciated the benchmarking booklet and the extra information. One other respondent also answered affirmatively, saying alignment was OK. Two indicated that alignment was not good, 1 saying that the materials did not match the sequence on the overheads. One respondent did not respond directly, but stated that she or he would have liked for the session to have progressed from the draft to the commercial stage.

Seventeen of 22 respondents answered the third question, *What suggestions would you have for improving the Benchmarking presentations?*, 5 giving more than one response. Seven expressed a desire for more time to practice benchmarking, 1 advocating a slower pace and 2 stating the need for more time to receive feedback as well as write benchmarks. Three respondents recommended a different procedure for engaging in practicing benchmarks, 2 suggesting that participants have the chance to work alone as well as together and 1 suggesting that they learn how to progress from the draft to the professional stage. Four respondents expressed a desire for more examples, more information on the models, or a greater variety of models. Two respondents suggested scheduling the benchmarking presentation for a different time of day. One would have liked to have seen a time line for how benchmarking should be accomplished in schools. One needed help distinguishing the responsibilities of the site researcher versus those of the school in writing benchmarks. Four respondents had no suggestions.

Eighteen of 22 respondents answered the fourth question, *How well did the Benchmarking presentations prepare you for implementing the Formative Evaluation Process for School Improvement?* Nine respondents answered affirmatively with a qualifying term such as *super*, *very well*, *good*, or *competent*, 1 adding that she or he would appreciate follow-up after facilitating benchmarking at a school. Three other respondents also answered affirmatively, but less strongly, saying that they felt fairly or somewhat well-prepared. Six respondents said that they did not feel

confident, sure, or well-prepared to facilitate benchmarking, 3 adding that this was the one aspect of the training about which they felt this way. One respondent each from the latter two response groups qualified their feeling of unpreparedness by saying that experiencing the process of facilitating benchmarking in a school would help to acclimate them to it.

Section E

The fifth section of the instrument posed these four questions related to the component of the training on the *School Observation Measure (SOM)*: (1) the most effective part of the presentation, (2) the quality of alignment between materials and presentation, (3) suggestions for improving this part of the presentation, and (4) efficacy of this training segment in preparing the participant for implementing FEPSI.

Twenty of 22 respondents answered the first question, *What was the most effective part of the School Observation Measure (SOM) presentations?*, 10 giving more than one response. Ten respondents said that the opportunity to practice in schools was the most effective part of the SOM segment, and correlated to that, 3 respondents said that debriefing after the practice was. Six respondents named the explanations and examples given in the presentation, and correlated to that, 1 respondent listed the presenter. Five respondents listed the video. Two listed the handbook. Two respondents named the instrument itself, referring to its clarity or comprehensibility. One said all parts of the SOM training were the most effective. One respondent suggested that more vignettes and discussion were needed. Finally, another ancillary comment stated why the SOM segment of the training was effective compared to other parts of the training—because it allowed more time for lecture, practice, and clarification.

Twenty-one of 22 respondents answered the second question, *How well did the materials in your notebook align with the School Observation Measure (SOM) presentations?* Twenty answered affirmatively with a qualifying term such as *very well*, *well*, *great*, *excellent*, or *good*, or with a statement. One respondent said *OK*. Several respondents made particular reference to a specific

training material: 4 mentioned the SOM notebook, 1 mentioned the training manual, and 1 mentioned a "cheat sheet."

Fourteen of 22 respondents answered the third question, *What suggestions would you have for improving the School Observation Measure (SOM) presentations?* Six respondents said none. Four suggested the presentation of more examples for observation and/or more time for discussion, 1 specifying that she or he would have preferred more video examples and time to debrief afterward. Three respondents each made one of the following suggestions for improvement: to have the training earlier in the year, to revise the response sheet, and to change the presenter's style. One response could not be coded.

Nineteen of 22 respondents answered the fourth question, *How well did the School Observtion Measure (SOM) presentations prepare you for implementing the Formative Evaluation Process for School Improvement?* Seventeen respondents answered affirmatively with a qualifying term such as *very well*, *great*, *good*, or *fine*, or with a statement using a term such as *comfortable*, *prepared*, *competent*, *connected* and *logical*. Another respondent also answered affirmatively, saying *OK*. One respondent added the suggestion that the training be held earlier in the year. One response could not be coded.

CONCLUSIONS

Several conclusions may be drawn based upon the data.

- Participants rated all items high (mean of 4.1 or above on a 5-point scale) related to specific and general training objectives.

- Participants clearly believed that the training was conducted by competent presenters, was conducted in a professional manner, and was relevant to their needs.

- Participants appeared to learn most about the role of formative evaluation in the CSRD program.

- Participants came to the training particularly knowledgeable of schools and classrooms and particularly skilled in written and oral communication as well as facilitation.

- Participants had the least prior knowledge of comprehensive school reform and CSR models.

- In general, participants seemed pleased with the training materials, although some specific suggestions for improvement were offered.

- Participants found the benchmarking materials to be very helpful, but would have liked even more time to practice with the benchmarking process.

- Participants felt least prepared to engage in the process of facilitating benchmarking in schools. This is likely due to the complexity of the task compared to others, rather than the quality of presentation itself.

- Participants were pleased with the hands-on practice with the SOM materials by video examples and visits to area schools and felt prepared to use the SOM materials.

RECOMMENDATIONS

A few recommendations may be suggested, given the conclusions of this report. They may be consulted prior to planning other FEPSI trainings.

- Consider the following finding in presenting future training: Some participants recommended that there be more logical flow in the training material, particularly as it corresponded to the flow of presentations (i.e., sequence to mimic overheads sequence, consecutive page numbering).

- Continue to use hands-on activities and school visits for the SOM segment of FEPSI training.

- Consider devoting more time and practice opportunities for the benchmarking segment of FEPSI training. Also, perhaps schedule it earlier in the day.

REFERENCES

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APPENDIX A:

School Observation Measure™ (SOM)

DIRECTIONS
USE NO. 2 PENCIL ONLY
MAKE DARK MARKS
LIKE THIS ●
ERASE COMPLETELY TO CHANGE

PLEASE DO NOT FOLD OR STAPLE THIS FORM.

School Observation Measure (SOM©)

Data Summary

For use in CSR formative evaluation conducted jointly by the Center for Research in Educational Policy, The University of Memphis and the AEL Regional Educational Laboratory, Charleston, WV.

School Name _____ Observer Name: _____

Date of Observation: _____ SOM # _____ Observer Role/Affiliation: _____

Number of classroom observations comprising this SOM. _____

Directions: Use your class-specific notes to reflect upon the extent to which each of the following is present in the school:

	0 - Not observed	1 - Rarely	2 - Occasionally	3 - Frequently	4 - Extensively
Instructional Orientation					
Direct instruction with the entire class (lecture)	○	○	○	○	○
Team teaching	○	○	○	○	○
Cooperative/collaborative learning	○	○	○	○	○
Individual tutoring (teacher, peer, aide, adult volunteer)	○	○	○	○	○
Classroom Organization					
Ability groups	○	○	○	○	○
Multi-age grouping	○	○	○	○	○
Work centers (for individuals or groups)	○	○	○	○	○
Instructional Strategies					
Instructional feedback (written or verbal) to enhance student learning	○	○	○	○	○
Integration of subject areas (interdisciplinary/thematic units)	○	○	○	○	○
Project-based learning	○	○	○	○	○
Use of higher-level questioning strategies	○	○	○	○	○
Teacher acting as a coach/facilitator	○	○	○	○	○
Parent/community involvement in learning activities	○	○	○	○	○
Student Activities					
Independent seatwork (self-paced worksheets, individual assignments)	○	○	○	○	○
Experiential, hands-on learning	○	○	○	○	○
Systematic individual instruction (differential assignments geared to individual needs)	○	○	○	○	○
Sustained writing/composition (self-selected or teacher-generated topics)	○	○	○	○	○
Sustained reading	○	○	○	○	○
Independent inquiry/research on the part of students	○	○	○	○	○
Student discussion	○	○	○	○	○
Technology Use					
Computer for instructional delivery (e.g. CAI, drill & practice)	○	○	○	○	○
Technology as a learning tool or resource (e.g. Internet research, spreadsheet or database creation, multi-media, CD Rom, Laser disk)	○	○	○	○	○
Assessment					
Performance assessment strategies	○	○	○	○	○
Student self-assessment (portfolios, individual record books)	○	○	○	○	○
Summary Items			*1=Low, 2=Moderate, 3=High*		
Academically focused class time			○	○	○
Level of student attention/interest/engagement			○	○	○

Rubric for SOM Scoring

(0) Not Observed: Strategy was never observed.

(1) Rarely: Observed in only one or two classes. Receives isolated use and/or little time in classes. Clearly not a prevalent/emphasized component of teaching and learning across classes.

(2) Occasionally: Observed in some classes. Receives minimal or modest time or emphasis in classes. Not a prevalent/emphasized component of teaching and learning across classes.

(3) Frequently: Observed in many but not all classes. Receives substantive time or emphasis in classes. A prevalent component of teaching and learning across classes.

(4) Extensively: Observed in most or all classes. Receives substantive time and/or emphasis in classes. A highly prevalent component of teaching and learning across classes.

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Classroom Observation Notes for School Observation Measure (SOM)

For use in formative evaluation conducted jointly by the Center for Research in Educational Policy, The University of Memphis and AEL Regional Educational Laboratory, Charleston, WV

School_____ **Observer Name**_____ **Time In**_____

Grade_____ **Observation Date**_____**SOM #**_____ **Time Out**_____

Subject/Activity Overview_____

_____

Directions: Use these "notes" to record whether each of the following was observed during the 15 minute observation period. (**O**= Observed.) You may wish to write comments that will assist you in qualitatively synthesizing classroom data to arrive at a holistic school observation summary.

Instructional Orientation	***O***	***Observation Notes***
Direct instruction, entire class	_____	_____
Team teaching	_____	_____
Cooperative/collaborative learning	_____	_____
Individual tutoring	_____	_____

Classroom Organization	***O***	***Observation Notes***
Ability groups	_____	_____
Multi-age grouping	_____	_____
Work centers in use	_____	_____

Instructional Strategies	***O***	***Observation Notes***
Instructional feedback	_____	_____
Integration of subject areas	_____	_____
Project-based learning	_____	_____
Higher-level questioning strategies	_____	_____
Teacher acting as a coach/facilitator	_____	_____
Parent/community involvement	_____	_____

Student Activities	*O*	*Observation Notes*
Independent seatwork		
Experiential, hands-on learning		
Systematic individual instruction		
Sustained writing/composition		
Sustained Reading		
Independent inquiry/research		
Student discussion		

Technology Use	*O*	*Observation Notes*
Computer for instructional delivery		
Technology as learning tool/resource		

Assessment	*O*	*Observation Notes*
Performance assessment strategies		
Student self-assessment		

Class Data for Summary Items	*Low*	*Moderate*	*High*
Academically focused class time			
Student attention/interest/focus			

Notes:

APPENDIX B:

One Page of a Sample Benchmark Document (AEL & CREP, 1999)

Happy Valley Basic School

Benchmarks, Indicators, and Evidence

Benchmark	Phase I		Phase II		Phase III	
	Indicator	*Evidence*	*Indicator*	*Evidence*	*Indicator*	*Evidence*
I. Curriculum						
A. The Centrality of Language						
In a fully implemented Basic School, language (broadly defined to include the written and spoken word, numbers, and the arts) is emphasized across the curriculum.	Teachers and students begin to explore and use the language of various disciplines.	Observation Principal/Teacher Feedback Facilitator Feedback Student Work	Most teachers design work that requires students to demonstrate proficiency in the use of language from various disciplines in student products and performances.	Observation Principal/Teacher Feedback Facilitator Feedback Student Work/Artifacts	All teachers design work that requires students to demonstrate proficiency in the use of language from various disciplines in student products and performances.	Observation Principal/Teacher Feedback Facilitator Feedback Student Work/Artifacts
B. Core Commonalities						
In the fully implemented Basic School, content and skills are integrated through the framework of the Commonalities.	Teachers have been trained in the Basic School model and are familiar with the Commonalities. Some teachers have begun using the Commonalities as the framework for integrating curriculum.	Observation Teacher Feedback Lesson Plans	Most teachers use the Core Commonalities as the primary framework for integrating content and skills across the curriculum.	Observation Teacher feedback Lesson Plans	All teachers integrate content and skills across the curriculum through the framework of the Core Commonalities.	Observation Teacher Feedback Lesson Plans

APPENDIX C:

Evaluation Form

Formative Evaluation Process for School Improvement
Orientation and Training
Georgia Department of Education
October 11-13, 1999
Macon, Georgia

Evaluation Form

We are interested in continuously improving our services. Please help us to do so by taking a few moments to respond to the following items. Your replies will remain anonymous and confidential, so feel free to answer candidly. Thank you!

Section A: Circle the number that best indicates the extent to which the orientation and training on the **Formative Evaluation Process for School Improvement. . . . .**

		Not at all				Very much
1.	Had clear outcomes	1	2	3	4	5
2.	Included clear directions for activities	1	2	3	4	5
3.	Facilitated development of new skills	1	2	3	4	5
4.	Was conducted in an appealing manner	1	2	3	4	5
5.	Was conducted in a professional manner	1	2	3	4	5
6.	Was conducted by competent presenter(s)	1	2	3	4	5
7.	Had activities that were well sequenced	1	2	3	4	5
8.	Had activities that reinforced the content	1	2	3	4	5
9.	Included appropriate examples	1	2	3	4	5
10.	Was relevant to my needs	1	2	3	4	5
11.	Had meaningful involvement of participants	1	2	3	4	5
12.	Stimulated me to want to use the concepts, skills, and/or materials presented	1	2	3	4	5
13.	Increased communication and collegiality with others	1	2	3	4	5
14.	Increased my understanding of formative evaluation	1	2	3	4	5

Section B: Listed below are items related to knowledge and skills to be obtained during the Orientation and Training sessions. Please rate each item on two dimensions: 1) *degree of knowledge/skill you had prior to training,* and 2) *degree to which knowledge/skill increased as a result of your participation.* **Scale: 1 = None or not at all to 5 = Very much or a lot**

		Prior Knowledge					Knowledge Gain				
15.	Understanding the role of formative evaluation in the CSRD program	1	2	3	4	5	1	2	3	4	5
16.	Knowledge of schools and classrooms	1	2	3	4	5	1	2	3	4	5
17.	Learning data collection techniques	1	2	3	4	5	1	2	3	4	5
18.	Oral and written communication skills	1	2	3	4	5	1	2	3	4	5
19.	Facilitation skills	1	2	3	4	5	1	2	3	4	5
20.	Skills in interpreting and analyzing qualitative and quantitative data	1	2	3	4	5	1	2	3	4	5
21.	Knowledge about and understanding of Comprehensive School Reform (e.g., relationship to Title I, school-wide programs, Obey-Porter legislation)	1	2	3	4	5	1	2	3	4	5
22.	Knowledge about Comprehensive School Reform models	1	2	3	4	5	1	2	3	4	5
23.	Familiarity with common strategies associated with school reform (e.g., use of technology, cooperative and team-based strategies, student-centered learning)	1	2	3	4	5	1	2	3	4	5
24.	Classroom observation skills (e.g., recognizing and identifying what is happening in a class)	1	2	3	4	5	1	2	3	4	5
25.	Technology skills (e.g., e-mail capability, Internet access, data entry)	1	2	3	4	5	1	2	3	4	5

Section C: Thinking only of the *Overviews on Formative Evaluation and Comprehensive School Reform*, please answer briefly the following questions.

26. What was most effective part of the *Overview* presentations?

27. How well did the materials in your notebook align with the *Overview* presentations?

28. What suggestions would you have for improving the *Overview* presentations?

29. How well did the *Overview* presentations prepare you for implementing the Formative Evaluation Process for School Improvement?

Section D: Thinking only of the *Benchmarking* sessions, please answer briefly the following questions.

30. What was most effective part of the *Benchmarking* presentations?

31. How well did the materials in your notebook align with the *Benchmarking* presentations?

32. What suggestions would you have for improving the *Benchmarking* presentations?

33. How well did the *Benchmarking* presentations prepare you for implementing the Formative Evaluation Process for School Improvement?

Section E: Thinking only of the *School Observation Measure (SOM)*, please answer briefly the following questions.

34. What was most effective part of the *School Observation Measure (SOM)* presentations?

35. How well did the materials in your notebook align with the *School Observation Measure (SOM)* presentations?

36. What suggestions would you have for improving the *School Observation Measure (SOM)* presentations?

37. How well did the *School Observation Measure (SOM)* presentations prepare you for implementing the Formative Evaluation Process for School Improvement?

APPENDIX D:

Completed Checklist for Applying the Standards from *The Program Evaluations Standards* (1994)

Checklist for Applying the Standards

To interpret the information provided on this form, the reader needs to refer to the full text of the standards as they appear in Joint Committee on Standards for Educational Evaluation, *The Program Evaluation Standards* (1994), Thousand Oaks, CA, Sage.

The Standards were consulted and used as indicated in the table below (check as appropriate):

Descriptor		The Standard was addressed	The Standard was partially addressed	The Standard was not addressed	The Standard was not applicable
U1	Stakeholder Identification	X			
U2	Evaluator Credibility	X			
U3	Information Scope and Selection	X			
U4	Values Identification	X			
U5	Report Clarity	X			
U6	Report Timeliness and Dissemination		X		
U7	Evaluation Impact	X			
F1	Practical Procedures	X			
F2	Political Viability	X			
F3	Cost Effectiveness	X			
P1	Service Orientation	X			
P2	Formal Agreements		X		
P3	Rights of Human Subjects	X			
P4	Human Interactions	X			
P5	Complete and Fair Assessment	X			
P6	Disclosure of Findings	X			
P7	Conflict of Interest	X			
P8	Fiscal Responsibility	X			
A1	Program Documentation	X			
A2	Context Analysis	X			
A3	Described Purposes and Procedures	X			
A4	Defensible Information Sources	X			
A5	Valid Information	X			
A6	Reliable Information	X			
A7	Systematic Information	X			
A8	Analysis of Quantitative Information	X			
A9	Analysis of Qualitative Information	X			
A10	Justified Conclusions	X			
A11	Impartial Reporting	X			
A12	Metaevaluation	X			

The Program Evaluation Standards (1994, Sage) guided the development of this (check one):

____ request for evaluation plan/design/proposal
____ evaluation plan/design/proposal
____ evaluation contract
_X_ evaluation report
____ other: _____

Name Paige Parrish Date 3/3/00

Paige Parrish (signature)

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Relation to Document First author

(e.g., author of document, evaluation team leader, external auditor, internal auditor)

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